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ABSTRACT

One of a series of 12 in the secretarial/clerical area, this booklet for the vocational instructor contains job descriptions for two word processing occupations, the non-typing administrative assistant and the correspondence specialist (also called word processing correspondence specialist, magnetic keyboard specialist, or word processing trainee); task lists under the areas of competency for each job; an occupational tasks competency record for each (suggested as replacement for the traditional report card) a list of industry representatives and educators involved in developing the project, and statements of competencies and a separate competency record for the area of human relations and personal development. The duties listed for the administrative assistant include these: Performs routine secretarial and administrative duties (usually for more than one person), prepares reports and other materials, makes travel arrangements, processes expense accounts, and maintains company records. The correspondence specialist duties involve operation of the typewriter and other office machines to process letters and other records and data. Areas of competency in human relations and personal development are included (communication, self-development, personal appearance, office attitude, social and business etiquette, and job-seeking skills). Statements of competencies may be graded at either the secondary or postsecondary level, and the competency records are intended to follow through vocational training at both levels. Tasks in the task list are cross referenced with those in the booklets for other secretarial/clerical jobs. (MF)

Administrative Assistant and Correspondence Specialist

TASK LIST COMPETENCY RECORD

U.S. DEPARTMENT OF HEALTH,
EDUCATION & WELFARE
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**STATEWIDE CURRICULUM ARTICULATION PROJECT
FOR VOCATIONAL EDUCATION**

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CROSS REFERENCE SYSTEM

Task Lists in the secretarial/clerical area include: office services aid, typist, general office/typist, receptionist, secretary/non-shorthand, secretary/shorthand, educational office personnel, medical secretary, legal secretary, administrative assistant, correspondence specialist, correspondence supervisor, and data entry operator. All Task Lists contain an add-on list of human relations/personal development qualities desirable for graduates seeking secretarial/clerical positions.

The task lists for office services aid, typist, general office/typist, receptionist, secretary/non-shorthand, and secretary/shorthand are referred to as "GENERAL" secretarial/clerical lists and all additional lists are referred to as "SPECIALIZED" lists.

The * and the numbering system is the key to cross-referencing for the specialized lists. The specialized lists are compared to the lists for typist, general office/typist, receptionist, secretary/non-shorthand, and secretary/shorthand. When there is something on the specialized list that is not on the general lists a * appears. The position of the * indicates the level of change made in the AREA OF COMPETENCY, The Statement of Competency, or the Task. For example, if the * appears before the AREA OF COMPETENCY the entire AREA OF COMPETENCY is new. If the * appears before a Statement of Competency or Task then only that Statement or Task is new. If the * appears before a word then only that word is new or different. It may be necessary to refer to more than one general task list when comparing statements of competency.

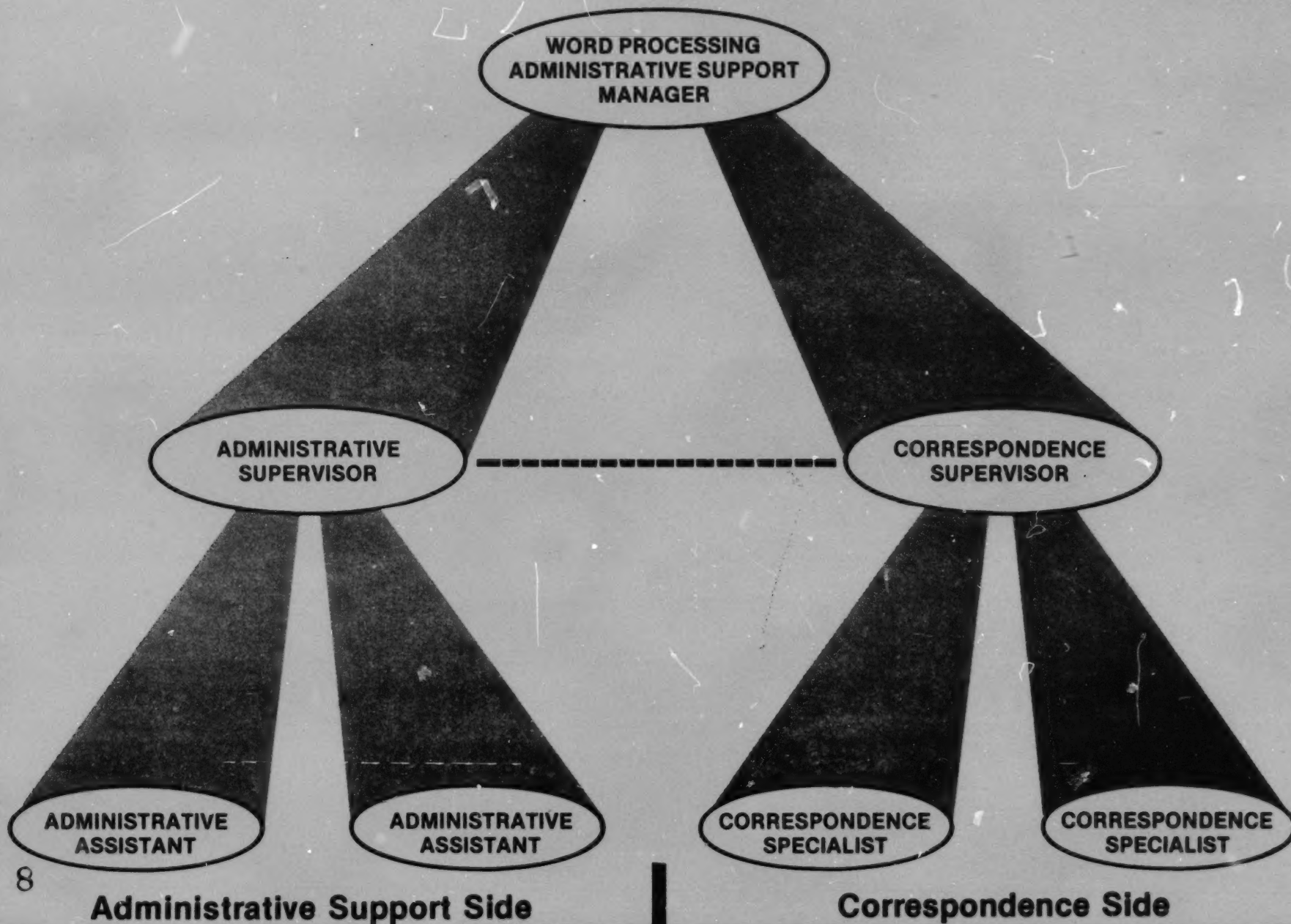
The Task List for Data Entry Operator is not referenced to the general lists because the tasks are unique in that area and need specialized training. The Task Lists for Correspondence Specialist and Correspondence Supervisor are not referenced to the general lists because tasks in these areas are applied to a word processing/correspondence center and the procedure for completing the tasks is different from the tasks in the general lists. The Task List for Correspondence Supervisor is cross-referenced as an add-on to the Correspondence Specialist Task List.

INTRODUCTION TO WORD PROCESSING

Word Processing is one of the fastest growing areas in Business and Industry. Education for this area should be considered a total word processing program and must include training for non-typing (Administrative Assistant) and training for typing (Correspondence Specialist) positions. Therefore, the task list for Word Processing Administrative Assistant and Word Processing Correspondence Specialist are presented in one booklet.

The worker mobility chart on the following page is typical of that found in a business office that has implemented the total word processing concept. This worker mobility chart identifies distinct functional areas for the Administrative Assistant and the Correspondence Specialist. Their areas are inter-dependent and permit total promotional mobility for office workers. An Administrative Assistant can move to a Correspondence Specialist position or be promoted to the Administrative Supervisor position. The Correspondence Specialist can move to the Administrative Assistant position or be promoted to the Correspondence Supervisor position. Promotion from either side leads to the Word Processing/Administrative Support Manager's position.

Worker Mobility Chart



INDUSTRY RECOMMENDATIONS

ADMINISTRATIVE ASSISTANT AND CORRESPONDENCE SPECIALIST

Industry representatives have made several suggestions to students who will seek employment upon completion of this occupational program. These suggestions are general in nature and describe the kind of individual whom they wish to hire. A competent worker is one who satisfactorily performs the tasks listed in this document and one who is mature and responsible. It is important that an employee have a positive attitude toward work and that he/she continues to learn on the job.

One way an employee continues to learn is through reading articles in professional journals and publications. It is very important for a person in this position to intelligently communicate with employers, associates, and the general public.

The employee who is an asset to the business assumes responsibility for communications (both written and oral) that leave the office. This includes using correct grammar and punctuation, spelling words correctly, and proofreading carefully so that neat and accurate corrections are made. Accuracy and confidentiality are extremely important in all secretarial/clerical occupations.

JOB DESCRIPTION

Administrative Assistant

Other common job titles could include: Administrative Secretary, Associate Secretary Administrative Services, Secretary Administrative Services.

The administrative assistant serves the company by performing secretarial and administrative duties within an administrative support center. He/she usually does work for more than one person and is directly responsible to an administrative supervisor.

Some of the responsibilities in addition to routine secretarial duties could include preparing reports on own initiative or from general instructions, maintaining or establishing a filing system, preparing materials for presentations, making travel arrangements, obtaining and coordinating information as requested, preparing or processing expense accounts, and maintaining specific company records for budgeting and any other purposes the company may request.

Graduates of the combined occupational program (administrative assistant and correspondence specialist) will be qualified to function as an administrative assistant or a correspondence specialist. Promotion to the position of administrative supervisor (responsibilities assumed by this individual appear in the appendix) or correspondence supervisor is possible through additional training or experience on the job.

TASK LIST

The following Task List gives you, the vocational instructor, recommendations about what your students should be able to do when they take a job as an ADMINISTRATIVE ASSISTANT. It was developed by a working committee of secretarial/clerical instructors and industry representatives throughout the state of Minnesota.

The Task List on the following pages includes the Tasks and the AREAS OF COMPETENCY recommended for a graduate of the Word Processing Occupational Program.

As you utilize this task list, you will need to continue working with your local advisory committee and with other instructors in your geographic area. Judgments must be made, by you, concerning the amount of time to spend in teaching various tasks, the conditions surrounding the performance of each task and the performance level for each task that will be acceptable.

Administrative Assistant

TASK LIST

AREA OF COMPETENCY: SPECIALIZED DUTIES

(TYPES VERY LITTLE—SENDS EVERYTHING POSSIBLE TO CORRESPONDENCE SPECIALISTS)

*I.A. Types general business correspondence from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, information compiled and composed at the typewriter, shorthand note transcription (Optional)

*1. types letters requested by supervisor or principal in several styles including any of the following features¹

- a. attention line
- b. carbon notations
- c. company name in closing
- d. enclosure notations
- e. listed materials
- f. mailing notations
- g. multiple page headings
- h. postscripts
- i. quoted material
- j. reference initials
- k. special closings
- l. special-sized stationery

- (1) executive size
- (2) half size
- (3) legal size

- m. statistical data in tabular form
- n. subject line

*The position of the * denotes the scope of the change made in the task list, the statement of competency, or the area of competency. This task list was referenced to the task list for secretary/non-shorthand and secretary/shorthand.

¹Business correspondence is usually done by the correspondence specialist.

2. types addresses on envelopes

- a. addresses for window envelopes
- b. mailing address (including ZIP Code)
- c. name above printed return address
- d. return address
- e. special notations

3. types interoffice memoranda²

- a. plain paper with appropriate heading
- b. pre-printed forms

*I.B. Types multiple copies of general business forms that are pertinent to the specific business from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, information compiled and composed at the typewriter.

1. types general business forms³

- a. bills of lading
- b. credit memorandums
- c. financial reports ⁴
- d. insurance forms
- e. invoices
- f. purchase orders
- g. purchase requisitions
- h. statements of account
- i. voucher checks
- j. vouchers

²The administrative assistant would type only short memos--the long or repetitive ones would be done by the correspondence specialist

³The administrative assistant would type general forms unless they were repetitive in which case the correspondence specialist would type them. The correspondence specialist usually does not type forms

⁴If the financial reports are statistical the correspondence specialist would type them

*I.C. Types miscellaneous material not practical to send to correspondence specialist from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, information compiled and composed at the typewriter, shorthand note transcription (Optional)

1. types miscellaneous material⁵

- a. address, file folder, and file drawer labels
- b. index cards
- *c. fill-in information
- d.-n. omit-
- e. other materials pertinent to the specific business

*I.D. Types reports (carbons may be required)⁶

*I.E. Prepares copy for reproduction (typing is done by the correspondence specialist)
(See Communications. I.D.)

*I.F. Types correspondence, records, reports, forms, and miscellaneous material from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, information compiled and composed at the typewriter, shorthand note transcription (optional)--with carbon copies

1. types materials with carbon copies

- a. to mail
- b. for office files
- *c. for company use

I.G. Proofreads and makes neat and accurate corrections of typed material

1. makes corrections on

- a. copies typed with fabric ribbons

⁵Administrative support could do some light typing

⁶Reports are usually sent to the correspondence specialist for typing

- b. copies typed with carbon ribbons
- c. carbon copies
- d. offset masters

*I.H. Proofreads typed material, notes errors, and returns to correspondence specialist

- 1. returns to correspondence specialist for corrections

AREA OF COMPETENCY: COMMUNICATIONS COMPOSITION (VERY IMPORTANT)

*I.A. Composes and dictates to a correspondence specialist routine correspondence from verbal or handwritten outline and submits for approval and signature (under direct supervision)

- 1. composes and dictates routine letters under direct supervision of supervisor
 - a. requesting information and/or services
 - b. expressing appreciation
 - c. supplying information
 - d. responding to complaints
 - e. declining a request
 - f. acknowledging correspondence
 - g. expressing acceptance
 - h. requesting payment
 - i. giving confirmation
 - j. expressing condolence
 - k. extending congratulations
 - l. others pertinent to the company
- 2. proofreads and edits materials returned by correspondence specialist
- 3. submits to principal or supervisor for approval and signature

- *I.B. Composes and dictates (or sends in hard copy form) to a correspondence specialist the business or informational reports requested by supervisor or principal, receives reports from correspondence specialist, proofreads, and submits to supervisor or principal for approval (Important)
1. prepares materials under direct supervision
 2. dictates or reads material to a central recorder
 3. proofreads and edits reports returned by correspondence specialist
 4. submits reports to supervisor or principal for approval
- *I.C. Composes and dictates to a correspondence specialist other materials unique to the business (under direct supervision)
1. prepares materials
 2. dictates from notes or reads materials to a correspondence specialist
 3. proofreads and edits materials returned by the correspondence specialist
 4. edits letters dictated by others
 5. edits manuscripts prepared by others
 6. prepares articles and announcements, news releases, form letters, and cover letters to send or read to a communication center
- *I.D. Prepares presentation material from drafts or detailed instruction (Very important)
1. prepares visual or audio materials
 - a. flip charts
 - b. transparencies (view graphs)
 - c. slides or other visual aids (usually just coordinates these)
 - d. line graphs
- *I.E. Collects materials (researches) for supervisor or principal to be used for speeches, etc.
- *I.F. Prepares materials for personal use within the company to sell an idea, train company employees or present new information (Optional)
1. discusses information with individuals or groups
 - a. to sell an idea

- b. to train company employees
- c. to present new information

- *I.G. Writes recommended work procedures for jobs or duties performed for approval by superior
- *I.H. Writes job descriptions for his/her position within the company for approval by superior
- *I.I. Designs and/or revises forms for efficient typing and processing under direction of supervisor

*AREA OF COMPETENCY: REPORTS/RESEARCH/PREPARATION

- I.A. Compiles and maintains continuing report requirements, prepares reports under direct supervision and submits to supervisor or principal (reports could include materials for budget control, cost analysis, statistical materials -e.g. profit and loss statements- or any other reports specifically for the company)
 - 1. collects facts and figures from several sources
 - a. internal sources
 - b. external sources
 - c. computer printouts
 - d. others
 - 2. composes reports and prepares audio or visual aids and displays as directed by supervisor
 - 3. presents drafts of reports or visuals to supervisor or principal for approval
 - 4. dictates or reads report to correspondence specialist for typing
 - 5. edits, proofreads, and returns to correspondence specialist for corrections if necessary
 - 6. presents final copy to supervisor or principal

- I.B. Keeps calendar of routine reports that are due and gives notice to supervisor for preparation

AREA OF COMPETENCY: RECORDS FILING AND MANAGEMENT

- *II.A. Maintains the currently used filing system or follows procedures used for maintaining a centralized filing system

1. codes documents for filing
2. adds new folders
3. locates and retrieves documents
4. refiles documents that have been removed
 - a. single pieces in file folders
 - b. entire file folder in drawer
5. searches for missing and misplaced materials
6. maintains records of materials taken out of files

- *I.B. Revises centralized or individual files to keep them current

1. follows principal's or supervisor's directions for retention and disposal of records
2. follows office procedures for transferring files to inactive files

- I.C. Cross-references documents and prepares cross-reference materials (Very important)

- I.D. Maintains index files

- I.E. Maintains "tickler" files for follow-up responsibilities

- I.F. Maintains personal "work in progress" file

- I.G. Operates micro-reproducing equipment (Optional)

- I.H. Selects materials for micro-reproducing (Optional)
- I.I. Determines recordkeeping needs and suggests a filing system
- *I.J. Establishes and sets up a filing system (under supervision) (Very important)
 - 1. requisitions necessary equipment and supplies
 - 2. prepares folders and guides
 - 3. files documents

AREA OF COMPETENCY: PUBLIC RELATIONS AND STAFF SERVICES (VERY IMPORTANT)

- II.A. Screens persons who enter the office
 - 1. screens visitors in compliance with company security policy
 - 2. makes visitors comfortable
 - 3. gives appropriate information to visitors or answers questions about where needed information can be obtained
 - 4. escorts visitors to appropriate office area
 - 5. makes introductions
 - 6. delivers oral or written messages from visitors to proper persons
 - 7. handles business cards
 - 8. provides company services within the scope of his/her authority
 - 9. arranges for outside services such as taxi or limousine
- I.B. Manages appointment information
 - 1. schedules appointments
 - 2. records appointments and keeps appointment book current
 - 3. alerts others of appointments or commitments
 - 4. records cancellations or no shows
 - *5. maintains supervisor's or principal's calendar⁷

⁷This usually involves keeping two calendars--one personal with appointments and one for principal or supervisor with appointments

AREA OF COMPETENCY: OFFICE FUNCTIONS

- I.A. Keeps desk and work area in order
- I.B. Maintains a bulletin board of announcements, news etc.
- I.C. Maintains employee information directory
- I.D. Writes/prints legibly

AREA OF COMPETENCY: OFFICE EQUIPMENT

- II.A. Maintains office equipment
 - 1. changes equipment ribbons
 - 2. cleans office equipment
 - 3. recommends service on equipment
 - 4. handles service calls on equipment
 - 5. -omit-
 - 6. makes minor repairs on office equipment
- II.B. Recommends changes in equipment
 - 1. prepares requisitions for equipment
 - 2. maintains records of equipment inventory and *location of equipment
 - 3. determines requirements for equipment
 - *4. gathers material or collects information to recommend or to justify to supervisor the purchase of new equipment or changes in equipment

AREA OF COMPETENCY: OFFICE SUPPLIES

- III.A. Maintains and keeps up to date personal and office inventory of supplies
 - 1. determines requirements for personal and office supplies
 - 2. prepares requisitions or requests

3. maintains and checks inventory records to determine if minimum quantities of supplies are on hand
4. orders and obtains supplies as needed from suppliers
5. checks incoming supplies with packing slip or invoice
6. unpacks and stores incoming supplies
7. maintains suppliers contact file
8. distributes and controls office supplies
9. prepares purchase orders

AREA OF COMPETENCY: MEETING/TRAVEL ARRANGEMENTS

*I.A. Makes travel arrangements

1. receives written requests and follows through according to guidelines set by supervisor
2. plans a schedule using
 - a. travel agency
 - b. printed schedules from transportation companies
 - c. travel department within the company
3. composes letter of reservation, sends to correspondence specialist for typing, proofreads returned letter, signs under own name or gives to supervisor or principal for signature
4. confirms availability of ticket in company's box at airport
5. coordinates issuance of travel box keys with principals and supervisor
6. prepares materials for supervisor's or principal's briefcase
7. prepares itinerary
8. makes and confirms transportation reservations
9. makes and confirms hotel and motel reservations
10. obtains necessary travel funds
11. compiles and types expense reports
12. maintains telephone and mail digest for absent supervisor or principal
13. changes schedules and arrangements as often as necessary

I.B. Schedules meetings and/or conferences (Very important)

1. contacts speakers
2. mails or distributes notices and specifics regarding location of meeting
3. schedules meeting times
4. sends confirmation notes as reminders of meetings
5. makes and notifies participants of changes or cancellations of meetings
6. reserves meeting room and arranges for refreshments
7. prepares and inspects meeting room for arrangements and equipment
8. processes registrations for conference participants
9. assembles needed materials for use during the meeting
10. prepares agenda for meetings⁸
11. attends meeting and reads minutes
- *12. attends meetings, takes notes, puts in memo form, dictates or reads to correspondence specialist for typing
13. distributes the typed minutes in person or by mail

AREA OF COMPETENCY: TELEPHONE COMMUNICATIONS

*I.A. Answers incoming telephone calls and answers as many inquiries as possible without turning call over to supervisor or principal

1. uses single line
2. uses multiple line
3. transfers calls to correct department or person
4. screens incoming calls
5. answers inquiries posed by telephone callers
6. records telephone messages (date and time)
7. requests complete information for call-backs
8. delivers telephone messages promptly

⁸The administrative assistant would format the agenda and have all the necessary information and submit it to the correspondence specialist for completion. The administrative assistant would be responsible for follow through to see that everything was completed

⁹Everyone is responsible for phone coverage

I.B. Places outgoing telephone calls

1. places local calls
2. places long distance calls
 - a. direct distance dial (ddd)
 - b. person-to-person
 - c. station-to-station
 - d. collect
 - e. credit card
3. places calls using specialized telephone services
 - a. conference calls
 - b. overseas long-distance calls
 - c. telephone facsimile equipment
 - d. specialized long-distance networks, such as WATS

I.C. Places outgoing and receives incoming calls using specialized telephone equipment

1. operates speakerphone
2. operates picture phone (optional)
3. uses bell boy service (pager service)
4. uses card dialers
5. operates after hours message recorder
6. contacts mobile phones

I.D. Finds needed information by using the telephone directory

1. uses the white pages
2. uses the yellow pages

AREA OF COMPETENCY: MAIL

*I.A. Receives and processes incoming mail

1. receives mail (usually from mail department)
2. opens mail
3. scans mail

4. screens mail and distributes to supervisor or principal
5. highlights or marks specific important information
6. sorts mail according to specific action required
 - a. long term or bulk reading
 - b. follow-up
 - c. documents that require dictation
7. attaches pertinent information
8. attaches notes telling what action could be taken or what action has been taken
9. drafts replies and attaches to correspondence
10. if reply is satisfactory--dictates it to correspondence specialist
11. maintains a follow-up system as directed

I.B. Prepares outgoing mail

1. collects mail from other offices or departments (optional)
2. folds and stuffs envelopes for mailing
- *3. addresses envelopes for mailing (mass mailing addresses done by correspondence specialist)
4. decides on least expensive and/or most desirable method of communication or delivery
5. processes outgoing letters and packages requiring special handling and/or special rates
6. processes bulk mailings
7. prepares and sends telegrams, cablegrams, or mailgrams
8. prepares, updates, and checks mailing lists
9. operates a postage meter
10. records use of postage meter in "Meter Record Book"
11. takes postage meter to post office to be refilled (optional)
12. operates a postage scale to determine correct postage
13. attaches correct postage
14. wraps packages for mailing
15. writes ZIP Codes on incoming or outgoing mail
16. files return receipts from registered or certified mail
17. insures mail
18. registers mail
- *19. processes mail received from correspondence center

AREA OF COMPETENCY: REPROGRAPHIC SERVICES¹⁰

*I.A. Operates duplicating equipment to obtain needed copies

1. operates a copy machine to obtain needed copies¹¹
2. proofreads to insure accuracy and quality of copy

I.B. Makes decisions about reprographic needs and follows through to obtain needed copies

1. decides what materials need to be copied
2. decides on the least expensive and/or most desirable way to create needed copies
3. makes arrangements to have materials duplicated

*a. prepares a copy requisition

AREA OF COMPETENCY: NUMERICAL DATA¹²

I.A. Maintains a petty cash fund

1. obtains checks to establish or replenish petty cash
2. makes payments from petty cash
3. prepares vouchers for money taken out or received
4. records petty cash entries in a journal or check register
5. prepares petty cash reports

I.B. -omit-

¹⁰A company large enough to use a word processing/administrative support system would usually have a special department for reprographics

¹¹Usually a minimum number and anything over that would go to duplicating department or print shop

¹²Companies using WP/AS would generally be large enough to have an accounting department to handle this

*I.C. Maintains records for payroll department's use

1. distributes W-4 Forms to new employees
2. distributes payroll checks received from payroll department
3. mails/distributes end of year W-2 Forms
4. keeps records of vacation time to give information to payroll department
5. keeps personnel records of sick leave to give information to payroll department

*I.D. Maintains records of incoming money

1. maintains records of incoming receipts or cash and sends receipts and cash to accounting department for deposit
2. purchases special checks from the bank
 - a. certified
 - b. bank drafts
 - c. money orders

*I.E. Provides information about bills, statements, and accounts payable to give to the accounting department¹³

1. checks accuracy of source documents
2. verifies items
3. calculates discounts
4. maintains list of account numbers
5. codes invoices, statements, etc. for payment

*I.F. Codes documents for accounts receivable records and sends them to the accounting department

*I.G. --included in I.E.--

I.H. --omit--

¹³The accounting department would provide the payment of bills and maintaining records of accounts payable

I.I. Keeps necessary records for the business

1. records promissory notes and drafts
2. records maturity dates
3. records insurance
4. records taxes
- *5. records expenses
 - a. travel
 - b. entertainment
 - c. other
- *6. maintains necessary records for credit cards
- *7. maintains records of authorized requisition lists

I.J. -omit-

AREA OF COMPETENCY: DATA PROCESSING

I.A. Codes forms for data entry

I.B. Reads computer printouts to obtain information to prepare required reports

I.C. Checks source documents against computer printouts for accuracy

I.D. -omit-

*I.E. Retrieves and sends information using a command counsel connected to a computer terminal

AREA OF COMPETENCY: REFERENCE MATERIALS

III.A. Uses general reference materials to look up spelling, pronunciation, definition of terms, compose, edit, and aid in research

1. uses general reference materials

- a. office or company's procedures manuals
- b. dictionary
- c. telephone directory
- d. quick reference words manual
- e. thesaurus
- f. outside agencies (both internal and external to the profession)
- g. city directory
- h. postal manual
- i. ZIP Code directory
- j. secretary's reference manual
- k. company files
- l. past records
- m. word division manual
- n. equipment operator manual
- o. library
- *p. hotel and travel guides

I.B. Maintains a reference library

AREA OF COMPETENCY: MACHINE OPERATION

I.A. -omit-

I.B. Operates the standard electric typewriter to perform basic office duties¹⁴

¹⁴Most of the typing would be done by the correspondence specialist

- I.C. Operates the selectric typewriter to perform basic office duties¹⁴
- I.D. Operates the self-correcting typewriter to perform basic office duties¹⁴ (Optional)
- I.E. Operates the proportional spacing typewriter to perform basic office duties¹⁴ (Optional)
- I.F. -omit-
- I.G. Operates the 10-key adding machine to perform basic office duties (Very important)
- I.H. Operates the electronic display calculator to perform basic office duties (Very important)
- I.I. Operates the electronic printing calculator to perform basic office duties (Very important)
- I.J. Operates the printing calculator to perform basic office duties (Optional)
- I.K. Operates the full-key adding machine to perform basic office duties¹⁵ (Optional)
- I.L. -omit-

AREA OF COMPETENCY: SUPERVISED WORK EXPERIENCE, OFFICE SIMULATION,
STUDENT ORGANIZATIONS (OPTIONAL)

- I.A. Participates in supervised work experience training (co-op or internship)
- I.B. Participates in a simulated office program
- I.C. Participates in co-curricular student organizations

COMPETENCY RECORD

The COMPETENCY RECORD that appears in this section is suggested as a replacement for the traditional report card. It can be used to give employers, teachers, counselors, students and parents information about what each student can and cannot do.

The COMPETENCY RECORD should follow the student through his or her vocational training in the secondary and/or the post-secondary school. The recommended grading scale is shown on the COMPETENCY RECORD. The COMPETENCY RECORD on the following pages includes ALL the AREAS OF COMPETENCY recommended for a graduate of the Administrative Assistant Occupational Program.

COMPETENCY RECORD

OCCUPATIONAL PROGRAM: ADMINISTRATIVE ASSISTANT

Name of Student _____

This competency record tells what the student, who is named above, has demonstrated that he or she can do. A graduate is one who has demonstrated competent performance of all the tasks designated for this occupational program. This competency record is to be used as an expansion of and/or supplement to the traditional report card. Student performance can be rated at the secondary and/or post secondary level.

RATING SCALE:

5 - Performs task(s) with ability that consistently exceed(s) program minimum standards set for job entry level; very competent.

4 - Performs task(s) at job entry level; competent.

3 - Performs task(s) with periodic assistance.

2 - Performs task(s) with constant assistance.

1 - Is unable to perform task(s).

T - Demonstrated ability to perform task(s) at or above job entry level by taking a challenge test.

PWPM - Actual production words per minute (PWPM) obtained by student.

SCHOOL(S) ATTENDED:

DATES ATTENDED

INSTRUCTOR'S NAME(S)

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: TYPEWRITTEN COMMUNICATIONS							
*I.A. Types general business correspondence from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, information compiled and composed at the typewriter, shorthand note transcription (Optional)							
*I.B. Types multiple copies of general business forms that are pertinent to the specific business from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, information compiled and composed at the typewriter							
*I.C. Types miscellaneous material not practical to send to correspondence specialist from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, shorthand note transcription (Optional)							
*I.D. Types reports (carbons may be required)							
*I.E. Prepares copy for reproduction (typing is done by the correspondence specialist)							
*I.F. Types correspondence, records, reports, forms, and miscellaneous material from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, information compiled and composed at the typewriter, shorthand note transcription (Optional)--with carbon copies							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.G. Proofreads and makes neat and accurate corrections of typed material							
*I.H. Proofreads typed material, notes errors, and returns to correspondence specialist							
Comments:							
AREA OF COMPETENCY: COMMUNICATIONS COMPOSITION (VERY IMPORTANT)							
*I.A. Composes and dictates to a correspondence specialist routine correspondence from verbal or handwritten outline and submits for approval and signature (under direct supervision)							
*I.B. Composes and dictates (or sends in hard copy form) to a correspondence specialist the business or informational reports requested by supervisor or principal, receives reports from correspondence specialist, proofreads, and submits to supervisor or principal for approval (Important)							
*I.C. Composes and dictates to a correspondence specialist other materials unique to the business (under direct supervision)							
*I.D. Prepares presentation material from drafts or detailed instruction (Very important)							
*I.E. Collects materials (researches) for supervisor or principal to be use for speeches, etc.							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
*I.F. Prepares materials for personal use within the company to sell an idea, train company employees or present new information (Optional)							
*I.G. Writes recommended work procedures for jobs or duties performed for approval by superior							
*I.H. Writes job descriptions for his/her position within the company for approval by superior							
*I.I. Designs and/or revises forms for efficient typing and processing under direction of supervisor							
Comments:							
*AREA OF COMPETENCY: REPORTS/RESEARCH/PREPARATION							
I.A. Compiles and maintains continuing report requirements, prepares reports under direct supervision and submits to supervisor or principal (reports could include materials for budget control, cost analysis, statistical materials-e.g. profit and loss statements--or any other reports specifically for the company)							
I.B. Keeps calendar of routine reports that are due and gives notice to supervisor for preparation							
Comments:							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: RECORDS FILING AND MANAGEMENT							
*II.A. Maintains the currently used filing system or follows procedures used for maintaining a centralized filing system							
*I.B. Revises centralized or individual files to keep them current							
I.C. Cross-references documents and prepares cross-reference materials (Very important)							
I.D. Maintains index files							
I.E. Maintains "tickler" files for follow-up responsibilities							
I.F. Maintains personal "work in progress" file							
I.G. Operates micro-reproducing equipment (Optional)							
I.H. Selects materials for micro-reproducing (Optional)							
I.I. Determines recordkeeping needs and suggests a filing system							
*I.J. Establishes and sets up a filing system (under supervision) (Very important)							
Comments:							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: PUBLIC RELATIONS AND STAFF SERVICES (VERY IMPORTANT)							
II.A. Screens persons who enter the office							
I.B. Manages appointment information							
Comments:							
AREA OF COMPETENCY: OFFICE FUNCTIONS							
I.A. Keeps desk and work area in order							
I.B. Maintains a bulletin board of announcements, news, etc.							
I.C. Maintains employee information directory							
I.D. Writes/prints legibly							
Comments:							
AREA OF COMPETENCY: OFFICE EQUIPMENT							
II.A. Maintains office equipment							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
II.B. Recommends changes in equipment							
Comments:							
AREA OF COMPETENCY: OFFICE SUPPLIES							
III.A. Maintains and keeps up to date personal and office inventory of supplies							
Comments:							
AREA OF COMPETENCY: MEETING/TRAVEL ARRANGEMENTS							
*I.A. Makes travel arrangements							
I.B. Schedules meetings and/or conferences (Very important)							
Comments:							
AREA OF COMPETENCY: TELEPHONE COMMUNICATIONS							
*I.A. Answers incoming telephone calls and answers as many inquiries as possible without turning call over to supervisor or principal							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.B. Places outgoing telephone calls							
I.C. Places outgoing and receives incoming calls using specialized telephone equipment							
I.D. Finds needed information by using the telephone directory							
Comments:							
AREA OF COMPETENCY: MAIL							
*I.A. Receives and processes incoming mail							
I.B. Prepares outgoing mail							
Comments:							
AREA OF COMPETENCY: REPROGRAPHIC SERVICES							
*I.A. Operating duplicating equipment to obtain needed copies							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.B. Makes decisions about reprographic needs and follows through to obtain needed copies							
Comments:							
AREA OF COMPETENCY: NUMERICAL DATA							
I.A. Maintains a petty cash fund							
I.B. -omit-							
*I.C. Maintains records for payroll department's use							
*I.D. Maintains records of incoming money							
*I.E. Provides information about bills, statements, and accounts payable to give to the accounting department							
*I.F. Codes documents for accounts receivable records and sends them to the accounting department							
*I.G. -Included in I.E.-							
I.H. -omit-							
I.I. Keeps necessary records for the business							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.J. -omit-							
Comments:							
AREA OF COMPETENCY: DATA PROCESSING							
I.A. Code forms for data entry							
I.B. Reads computer printouts to obtain information to prepare required reports							
I.C. Checks source documents against computer printouts for accuracy							
I.D. -omit-							
*I.E. Retrieves and sends information using a command counsel connected to a computer terminal							
Comments:							
AREA OF COMPETENCY: REFERENCE MATERIALS							
III.A. Uses general reference materials to look up spelling pronunciation, definition of terms, compose, edit, and aid in research							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.B. Maintains a reference library							
Comments:							
AREA OF COMPETENCY: MACHINE OPERATION							
I.A. -omit-							
I.B. Operates the standard electric typewriter to perform basic office duties							
I.C. Operates the electric typewriter to perform basic office duties (Optional)							
I.D. Operates the self-correcting typewriter to perform basic office duties (Optional)							
I.E. Operates the proportional spacing typewriter (Optional)							
I.F. -omit-							
I.G. Operates the 10-key adding machine to perform basic office duties (Very important)							
I.H. Operates the electronic display calculator to perform basic office duties (Very important)							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.I. Operates the electronic printing calculator to perform basic office duties (Very important)							
I.J. Operates the printing calculator to perform basic office duties (Optional)							
I.K. Operates the full-key adding machine to perform basic office duties (Optional)							
I.L. -omit-							
Comments:							
AREA OF COMPETENCY: SUPERVISED WORK EXPERIENCE, OFFICE SIMULATION, STUDENT ORGANIZATIONS (OPTIONAL)							
I.A. Participates in supervised work experience trianing (co-op or internship) Type of business, institution, or agency: _____ _____ Length of time: _____ _____							
I.B. Participates in a simulated office program Length of program: _____ _____							

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	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.C. Participates in co-curricular student organizations Name of organization: _____ _____							
Comments:							

Statements of competencies can be graded at either the secondary or post-secondary level.

JOB DESCRIPTION

Correspondence Specialist

Other common job titles which graduates may have include: Word Processing Correspondence Specialist, Correspondence Secretary, Magnetic Keyboard Specialist, Word Processing Trainee.

The correspondence specialist operates diversified equipment to process information received in recorded form, handwritten form, or typewritten revised form into an acceptable document for use as intended by the author. This may include letters, reports, tabulations, etc. All duties are performed according to office procedures.

The person employed in this position must produce high volume, quality work that meets company standards and practices. This person must be able to edit a document without losing the original meaning.

The correspondence specialist must have the ability to work independently and/or with a group while under direct supervision and exercising no supervisory responsibility.

Graduates of this program are qualified for employment in an office that utilizes the word processing concept.

TASK LIST

The following Task List gives you, the vocational instructor, recommendations about what your students should be able to do when they take a job as a CORRESPONDENCE SPECIALIST. It was developed by a working committee of secretarial/clerical instructors and industry representatives throughout the state of Minnesota.

The Task List on the following pages includes the Tasks and the AREA OF COMPETENCY recommended for a graduate of the Word Processing Occupational Program.

As you utilize this task list, you will need to continue working with your local advisory committee and with other instructors in your geographic area. Judgments must be made, by you, concerning the amount of time to spend in teaching various tasks, the conditions surrounding the performance of each task and the performance level for each task that will be acceptable.

*Correspondence Specialist

TASK LIST

AREA OF COMPETENCY: TYPEWRITTEN COMMUNICATIONS

I.A. Types business documents from: transcription equipment, hard copy, stored documents

1. types business letters in several styles including any of the following features

- a. attention line
- b. carbon notations
- c. company name in closing
- d. enclosure notations
- e. listed material
- f. mailing notations
- g. multiple page headings
- h. postscripts
- i. quoted material
- j. reference initials
- k. special closings
- l. special-sized stationery
 - (1) executive size
 - (2) half size
 - (3) legal size
 - (4) metric update

* This task list is not referenced to the general lists for typist, general office/typist, secretary/non-shorthand and secretary/shorthand. Even though some of the tasks are the same as on the general lists the procedures, applications and conditions under which they are performed varies sufficiently to warrant specific training as would be applied to business/industry using a word processing system.

- m. statistical data in tabular form
- n. subject line
- o. document codes
- p. special formats

2. types addresses on envelopes

- a. addresses for window envelopes
- b. mailing address (including ZIP Code)
- c. name above printed return address
- d. return address
- e. special notations

3. types interoffice memos

4. types manuscripts

- a. footnotes

5. types multiple page reports

I.B. Types copy for reproduction from: transcription equipment, hard copy, stored documents

- 1. types offset masters
- 2. types masters for photo reproduction
- 3. types photo composition input

I.C. Types miscellaneous material from: transcription equipment, hard copy, stored documents

1. types miscellaneous material

- a. address, file folder and file drawer labels
- b. company news letters
- c. index cards
- d. itineraries
- e. meeting agendas

- f. name badges
- g. news releases
- h. postcards
- i. speeches
- j. statistical reports
- k. summaries of minutes of meetings or conferences
- l. various office forms
- m. various periodical reports
- n. other materials pertinent to the specific business

I.D. Types business documents and miscellaneous material from transcription equipment, hard copy, and stored documents supplying carbon copies as requested

- 1. types carbon copies

AREA OF COMPETENCY: LOGGING-IN

I.A. Performs logging-in procedures for work coming into the correspondence center via central recording equipment

- 1. removes media from recorder
- 2. places clean media on the recorder when necessary
- 3. completes log sheet and attaches media removed from central recorder
 - a. records time dictation was received
- 4. places media and log sheet in hold folder according to centers work in progress procedures

I.B. Performs logging-in procedures for hard copy coming into the correspondence center

- 1. completes log sheet and attaches to hard copy
 - a. records time copy was received
- 2. places hard copy and log sheet in hold folder according to centers work in progress procedures

I.C. Performs logging-in procedures for stored copy

1. selects needed materials from stored copy file
2. completes log sheet indicating amount of work and time of completion

AREA OF COMPETENCY: KEYBOARDING (ON MAGNETIC KEYBOARD)

I.A. Keyboards from recorded media, hard copy or stored documents and produces final copy as requested by center users

1. removes recorded media, hard copy, or stored documents from central hold folder or stored document file following center procedures to obtain materials needed for key-boarding
 - a. indicates time and date picked up on log sheet
2. keyboards materials obtained
 - a. types copy
 - (1) rough-draft form
 - (2) first-time-final
 - (3) documents for permanent storage
3. edits and proofreads for playback in final form
 - a. punctuation
 - b. spelling
 - c. grammar
 - d. word division
 - e. format
4. plays back rough draft, edited materials in final form
5. uses line counter or specific office measuring procedure to determine amount of work typed

6. completes log sheet to indicate work completed

- a. indicates time completed
- b. classifies type of document

- (1) original
- (2) hard copy
- (3) stored document
- (4) revisions
- (5) statistical

c. determines amount of work completed

- (1) lines
- (2) pages
- (3) keystrokes
- (4) time

- 7. scans, erases, refiles, or returns to user the transcribed media, hard copy, or stored documents as determined by center procedures
- 8. routes completed copy to word originator

B. Keyboards variable information when playing back stored documents

- 1. obtains stored document according to center procedures
- 2. plays back stored material and inserts variable information as needed
- 3. edits and proofreads for accurate final copy
- 4. measures work
- 5. completes log sheet
- 6. returns completed copy to word originator for final approval

C. Keyboards documents using specialized terminology as determined by the needs of the business (e.g. legal, medical)

D. Proofreads and makes neat and accurate corrections of typed material

AREA OF COMPETENCY: RECORDS FILING AND MANAGEMENT (AS APPLIED TO CENTER PROCEDURES)

I.A. Maintains the currently used filing system

1. adds new jackets, folders, or envelopes
2. locates and retrieves stored information
 - a. magnetic media
 - b. hard copy
3. refiles stored media
4. searches for missing and misplaced materials

I.B. Codes documents for filing

1. assigns code numbers
2. records name of author requesting the work

I.C. Maintains index files

I.D. Maintains personal "work in progress" file

I.E. Maintains central "work in progress" file

I.F. Maintains log records

I.G. Retains completed/output media for predetermined number of days using the procedure for holding as established by the center

I.H. Maintains "tickler" file

AREA OF COMPETENCY: OFFICE EQUIPMENT

I.A. Maintains office equipment

1. changes equipment ribbons
2. cleans office equipment
3. recommends service on equipment
4. makes minor adjustments on office equipment

AREA OF COMPETENCY: OFFICE SUPPLIES

I.A. Maintains personal inventory of supplies

1. determines requirements for personal desk supplies and checks to see if minimum quantities are on hand
2. prepares requisitions or requests supplies as needed from supervisor

AREA OF COMPETENCY: TELEPHONE COMMUNICATIONS

I.A. Answers incoming telephone calls

1. answers inquires posed by telephone callers
2. records telephone messages
3. delivers or routes telephone messages

I.B. Places outgoing telephone calls

1. places local calls
2. places outgoing long distance calls through supervisor

I.C. Keeps internal telephone records

1. keeps list of frequently called numbers up to date
2. reminds supervisor to make call backs

I.D. Looks up information by using the telephone directory

1. uses the white pages
2. uses the yellow pages

I.E. Places outgoing and receives incoming calls using specialized equipment

1. operates speakerphone
2. operates picture phone (optional)
3. uses bell-boy service (pager service)
4. uses card dialers
5. operates after hours message recorder
6. uses accoustic contacts (optional)

AREA OF COMPETENCY: REPROGRAPHIC SERVICES

I.A. Creates needed copies

1. operates duplicating equipment
 - a. offset (optional)
 - b. photocopier
2. collates materials
 - a. manually
 - b. by machine

AREA OF COMPETENCY: REFERENCE MATERIALS

I.A. Uses general reference materials to compose, edit, aid in research, look up spelling, pronunciation, definition of terms

1. uses general reference material
 - a. office or company's procedures manual
 - b. dictionary
 - c. telephone directory and yellow pages
 - d. quick reference words manual
 - e. thesaurus
 - f. ZIP Code directory
 - g. secretary's reference manual
 - h. company files

- i. past records
- j. word division manual
- k. equipment operations manual
- l. atlas/road maps

I.B. Uses specialized reference materials for understanding of operations, procedures, and utilization of a word processing system

- 1. uses book of authorized users
 - a. how their name and title should appear
- 2. uses central manuals of office procedures
 - a. secretary's manual
 - b. dictator's manual
- 3. communications manual
 - a. computer manual

I.C. Uses specialized manuals specific to the company

- 1. uses equipment manuals
- 2. uses training manuals
- 3. uses company policy manual

AREA OF COMPETENCY: MACHINE OPERATIONS

- I.A. Operates the 10-key adding machine to perform basic office duties
- I.B. Operates the electronic display calculator to perform basic office duties
- I.C. Operates the electronic printing calculator to perform basic office duties
- I.D. Operates the transcribing machine to perform basic office duties
- I.E. Operates the automatic/power typewriter to perform basic office duties (Magnetic Keyboard)
Kind: _____
- I.F. Operates central recording equipment (input equipment) to perform basic office duties:
Kind: _____
- I.G. Operates the envelope stripper to perform basic office duties (Optional)
- I.H. Operates the continuous slitter to perform basic office duties (Optional)
- I.I. Operates the telex to perform basic office duties (Optional)

**AREA OF COMPETENCY: SUPERVISED WORK EXPERIENCE, OFFICE SIMULATION,
STUDENT ORGANIZATIONS (OPTIONAL)**

- I.A. Participates in supervised work experience training (co-op, internship)
- I.B. Participates in simulated office program
- I.C. Participates in co-curricular student organizations

COMPETENCY RECORD

The COMPETENCY RECORD that appears in this section is suggested as a replacement for the traditional report card. It can be used to give employers, teachers, counselors, students and parents information about what each student can and cannot do.

The COMPETENCY RECORD should follow the student through his or her vocational training in the secondary and/or the post-secondary school. The recommended grading scale is shown on the COMPETENCY RECORD. The COMPETENCY RECORD on the following pages includes ALL the AREAS OF COMPETENCY recommended for a graduate of the Correspondence Specialist Occupational Program.

COMPETENCY RECORD

OCCUPATIONAL PROGRAM: CORRESPONDENCE SPECIALIST

Name of Student _____

This competency record tells what the student, who is named above, has demonstrated that he or she can do. A graduate is one who has demonstrated competent performance of all the tasks designated for this occupational program. This competency record is to be used as an expansion of and/or supplement to the traditional report card. Student performance can be rated at the secondary and/or post secondary level.

RATING SCALE:

5 - Performs task(s) with ability that consistently exceed(s) program minimum standards set for job entry level; very competent.

4 - Performs task(s) at job entry level; competent.

3 - Performs task(s) with periodic assistance.

2 - Performs task(s) with constant assistance.

1 - Is unable to perform task(s).

T - Demonstrated ability to perform task(s) at or above job entry level by taking a challenge test.

PWPM - Actual production words per minute (PWPM) obtained by student.

SCHOOL(S) ATTENDED:

DATES ATTENDED

INSTRUCTOR'S NAME(S)

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: TYPEWRITTEN COMMUNICATIONS							
I.A. Types business documents from: transcription equipment, hard copy, stored documents							
I.B. Types copy for reproduction from: transcription equipment, hard copy, stored documents							
I.C. Types miscellaneous material from: transcription equipment, hard copy, stored documents							
I.D. Types business documents and miscellaneous material from: transcription equipment, hard copy, and stored documents supplying carbon copies as requested							
Comments:							
AREA OF COMPETENCY: LOGGING-IN							
I.A. Performs logging-in procedures for work coming into the correspondence center via central recording equipment							
I.B. Performs logging-in procedures for hard copy coming into the correspondence center							
I.C. Performs logging-in procedures for stored copy							
Comments:							

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	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: KEYBOARDING (ON MAGNETIC KEYBOARD)							
I.A. Keyboards from recorded media, hard copy or stored documents and produces final copy as requested by center users							
I.B. Keyboards variable information when playing back stored documents							
I.C. Keyboards documents using specialized terminology as determined by the needs of the business (e.g. legal, medical)							
I.D. Proofreads and makes neat and accurate corrections of typed material							
Comments:							
AREA OF COMPETENCY: RECORDS FILING AND MANAGEMENT (AS APPLIED TO CENTER PROCEDURES)							
I.A. Maintains the currently used filing system							
I.B. Codes documents for filing							
I.C. Maintains index files							
I.D. Maintains personal "work in progress" file							
I.E. Maintains central "work in progress" file							
I.F. Maintains log records							
I.G. Retains completed/output media for predetermined number of days using the procedure for holding as established by the center							
I.H. Maintains "tickler" filer							

Comments:

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	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: OFFICE EQUIPMENT							
I.A. Maintains office equipment							
Comments:							
AREA OF COMPETENCY: OFFICE SUPPLIES							
I.A. Maintains personal inventory of supplies							
Comments:							
AREA OF COMPETENCY: TELEPHONE COMMUNICATIONS							
I.A. Answers incoming telephone calls							
I.B. Places outgoing telephone calls							
I.C. Keeps internal telephone records							
I.D. Looks up information by using the telephone directory							
I.E. Places outgoing and receives incoming calls using specialized equipment							
Comments:							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: REPROGRAPHIC SERVICES							
I.A. Creates needed copies							
Comments:							
AREA OF COMPETENCY: REFERENCE MATERIALS							
I.A. Uses general reference materials to compose, edit, aid in research, look up spelling, pronunciation, definition of terms							
I.B. Uses specialized reference materials for understanding of operations, procedures, and utilization of a word processing system							
I.C. Uses specialized manuals specific to the company							
Comments:							
AREA OF COMPETENCY: MACHINE OPERATION							
I.A. Operates the 10-key adding machine to perform basic duties							
I.B. Operates the electronic display calculator to perform basic office duties							
I.C. Operates the electronic printing calculator to perform basic office duties							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.D. Operates the transcribing machine to perform basic office duties							
I.E. Operates the automatic/power typewriter to perform basic office duties (magnetic keyboard) Kind: _____							
I.F. Operates central recording equipment (input equipment) to perform basic office duties Kind: _____							
I.G. Operates the envelope stripper to perform basic office duties (Optional)							
I.H. Operates the continuous slitter to perform basic office duties (Optional)							
I.I. Operates the telex to perform basic office duties (Optional)							
Comments:							
AREA OF COMPETENCY: SUPERVISED WORK EXPERIENCE, OFFICE SIMULATION, STUDENT ORGANIZATIONS (OPTIONAL)							
I.A. Participates in supervised work experience training (co-op, internship)							
Type of business, institution, or agency: _____							
Length of time: _____							

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	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.B. Participates in simulated office program Length of program: _____ _____							
I.C. Participates in co-curricular student organizations Name of organization: _____ _____							
Comments:							

Statements of competencies can be graded at either the secondary or post-secondary level.

INDUSTRY REPRESENTATIVES

The following Industrial Representatives were involved in the development of the task list for this occupational program.

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HUMAN RELATIONS AND PERSONAL DEVELOPMENT

Secretarial/clerical personnel work with people. For this reason additional competencies in the area of Human Relations and Personal Development are needed by the student who wishes to become employed. People work together when they have an understanding of themselves and their co-workers and when they willingly make appropriate adjustments in their own behavior.

The STATEMENTS OF COMPETENCY shown in the following section of this task list represent the minimal Human Relationship and Personal Development skills needed by graduates of secretarial/clerical programs. It should be recognized that students will continue to learn about themselves and others through daily experiences they have in their careers.

HUMAN RELATIONS AND PERSONAL DEVELOPMENT

AREA OF COMPETENCY: COMMUNICATIONS

- A. Demonstrates acceptance of people in a friendly business-like manner
 - 1. interacts verbally with people in communicating a message
 - a. enunciates clearly
 - b. uses correct grammar and appropriate choice of words
 - c. shows/demonstrates tact
 - d. responds courteously
 - e. uses a pleasant speaking tone, rate and volume
 - 2. asks, remembers and uses persons' names in communicating with people
 - 3. interacts non-verbally with people in communicating a message
 - a. recognizes the meaning of facial expression
 - b. recognizes the meaning of body language
 - c. recognizes the meaning of eye contact
 - d. recognizes the meaning of hidden messages
- B. Listens to and responds to the messages received from co-workers, supervisors and visitors
 - 1. takes notes when receiving instructions
 - 2. periodically looks at the person who is speaking to obtain visual cues
 - 3. asks for clarification when the message is not understood
 - 4. concentrates on one thing at a time as directions are given
- C. Gives directions and responds to other people
 - 1. makes use of an understanding of human behavior
 - 2. displays an ability to be assertive without being offensive
 - 3. deals effectively with angry or defensive co-workers/customers
 - 4. recognizes the uniqueness of and differences in individuals

AREA OF COMPETENCY: SELF-DEVELOPMENT

- A. Demonstrates a disposition for continued personal growth and understanding of self

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1. thinks positively about himself/herself and his/her future
2. does not show off to bolster his/her self-confidence
3. waits for what he/she wants
4. makes up his/her mind decisively
5. admits his/her shortcomings
6. recognizes and builds on his/her strengths without becoming vain
7. seeks out new ways to develop his/her talents
8. has a realistic self-image based upon the way that others see him/her
9. has a positive attitude about self and others

B. Displays personal development for social living

1. handles personal finances
2. chooses life style and housing options
 - a. displays an ability to live and work with others harmoniously
3. chooses safe and reliable transportation
4. identifies personal biases, prejudices, and stereotypes

C. Shows emotional maturity

1. tolerates frustrations
2. thinks for himself/herself
3. is calm and exerts extra effort to keep on an even level
4. tackles unpleasant tasks without self-pity
5. takes responsibility for his/her own actions
6. understands his/her role in group dynamics
7. takes orders without becoming obstinate
8. is motivated by a long-range plan, not by whims or desires of each passing week
9. does not nurse grudges or try to get even

D. Maintains professional maturity

1. has clearly defined career goals
 - a. views his/her job professionally, rather than as only a means of obtaining a pay check
 - b. sees job satisfaction as part of good mental health
 - c. sets realistic goals based on his/her abilities

AREA OF COMPETENCY: PERSONAL APPEARANCE

A. Maintains good physical fitness behavior patterns

1. gets sufficient sleep
2. shows good nutrition

3. gets proper exercise
4. has annual dental and medical check-ups
5. has good posture

B. Shows good visual poise

1. demonstrates an appropriate method of standing, walking, sitting, bending and lifting

C. Selects and wears proper office attire

1. is groomed attractively and tastefully
 - a. wears clean, wrinkle free garments
 - b. wears flattering colors and garment styles for his/her figure
 - c. chooses accessories that are appropriate for work
 - (1) fads
 - (2) fashions
 - d. coordinates colors of garments and accessories worn together
 - e. plans a wardrobe for a limited budget
 - f. wears shoes that are quiet, polished, fastened and in good repair
 - g. shops for clothing that is well constructed so that it will last

D. Has good personal hygiene habits

1. bathes his/her body regularly
2. uses antiperspirant
3. has clean hair, skin, teeth, nails, and breath
4. wears clean clothes that have been laundered properly
5. removes hair properly and regularly from selected areas of the body
6. applies cosmetics in a skillful way to enhance features
7. subtly applies body fragrances

AREA OF COMPETENCY: OFFICE ATTITUDE

A. Relates to male and female co-workers of all ages, skills, backgrounds, and positions

1. contributes to a team effort
 - a. requests and/or gives assistance to other people
 - b. handles constructive/non-constructive criticism and profits from it
 - c. declines invitations gracefully
 - d. responds cheerfully and gives praise when appropriate
 - e. is supportive and encouraging to co-workers

2. assumes individual job responsibility
3. deals effectively with friction and tension within the office
 - a. co-workers who don't assume full share of workload
 - b. moodiness of co-workers/supervisors
 - c. favoritism among staff
 - d. personal problems which interfere with work
 - e. offensive language or behavior of co-workers, supervisor or customers
 - f. improper hygiene of co-workers which is offensive to others
 - g. angry customers
 - h. chronic complainers
 - i. short-tempered co-workers, supervisor or self

B. Supports company and employer by exhibiting professionalism

1. shows loyalty to company
2. follows the company's policies
3. maintains confidentiality of company/institutional information
4. anticipates needs of supervisor
5. demonstrates cost control
 - a. conserve supplies
 - b. use time efficiently
 - c. develop and improve personal work methods and procedures
6. displays good housekeeping habits
 - a. cleans and maintains work area
 - b. cleans and organizes employer's work area as instructed
 - c. makes coffee and keeps coffee area neat and clean
7. shows professional commitment to his/her employer
 - a. shows flexibility and willingness to try new approaches
 - b. is versatile and willing to adopt his/her behavior to new situations
 - c. willingly works overtime to meet scheduled deadlines
 - d. asserts his/her feeling, needs, and competence in communicating with his/her employer about salary, benefits, and company policy

C. Shows that he/she is dependable in the office situation

1. has work habits that insure work being accomplished on time and correctly
2. arrives at work on time and maintains scheduled working hours
3. plans and schedules work assignments and priorities
4. takes reasonable coffee breaks and lunch breaks
5. has a good attendance record with sick leave and personal days taken when necessary
6. pays attention to detail so that high quality work is maintained consistently
7. follows through to completion work that has been started

D. Shows initiative in gaining professional advancements

1. seeks job/self enhancement experiences
 - a. updates his/her skills and knowledge through formal education, in-house training, and informal communication
 - b. participates in professional organizations
2. selects or rejects job promotions based on opportunity, personal goals, and circumstances
 - a. examines alternatives and engages in career planning
 - (1) long term
 - (2) short term

AREA OF COMPETENCY: SOCIAL AND BUSINESS ETIQUETTE

A. Displays proper social etiquette

1. etiquette for social functions (e.g. introductions, table manners, common courtesy)

B. Displays proper business etiquette

1. converses with co-workers and guests in a socially acceptable manner, within the time constraint of the office situation
 - a. office business (non-confidential)
 - b. personal business
 - c. social events
 - d. topics of general interest
2. uses the informal communications network (grapevine) within the office in a positive way
3. refrains from contributing to office gossip

4. addresses superior properly (e.g. Mr., Dr., Ms., etc.)
 - a. formal
 - b. non-formal

AREA OF COMPETENCY: JOB SEEKING SKILLS

- A. Identifies job opportunities for which he/she is qualified
 1. checks school bulletin board
 2. reads newspaper ads
 3. contacts employment agencies
 - a. state
 - b. private
 4. uses personal contacts
- B. Prepares for job interview
 1. writes and types a resume
 2. composes and types a letter of application
 3. contacts a prospective employer
 4. arrives on time
 5. conveys an optimistic outlook and willingness to learn
- C. Participates in a job interview
 1. dresses and grooms himself/herself appropriately
 2. obtains job information from perspective employer
 - a. job requirements
 - b. benefits
 - c. environment
 - d. salary
 - e. opportunity for advancement
 - f. company's purpose and function
- D. Follows-up on the job interview
 1. sends an acknowledgment letter
 2. makes a phone call

COMPETENCY RECORD

HUMAN RELATIONS AND PERSONAL DEVELOPMENT

OCCUPATIONAL PROGRAM: ADMINISTRATIVE ASSISTANT
AND
CORRESPONDENCE SPECIALIST

Name of Student _____

This competency record tells what the student, who is named above, has demonstrated that he or she can do. A graduate is one who has demonstrated competent performance of all the tasks designated for this occupational program. This competency record is to be used as an expansion of and/or supplement to the traditional report card. Student performance can be rated at the secondary and/or post secondary level.

RATING SCALE:

- 5 - Performs task(s) with ability that consistently exceed(s) program minimum standards set for job entry level; very competent.
- 4 - Performs task(s) at job entry level; competent.
- 3 - Performs task(s) with periodic assistance.
- 2 - Performs task(s) with constant assistance.

1 - Is unable to perform task(s).

T - Demonstrated ability to perform task(s) at or above job entry level by taking a challenge test.

PWPM - Actual production words per minute (PWPM) obtained by student.

SCHOOL(S) ATTENDED: _____

DATES ATTENDED _____

INSTRUCTOR'S NAME(S) _____

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: COMMUNICATIONS							
A. Demonstrates acceptance of people in a friendly-business-like manner							
B. Listens to and responds to the messages received from co-workers, supervisors and visitors							
C. Gives directions and responds to other people							
Comments:							
AREA OF COMPETENCY: SELF-DEVELOPMENT							
A. Demonstrates a disposition for continued personal growth and understanding of self							
B. Displays personal development for social living							
C. Shows emotional maturity							
D. Maintains professional maturity							
Comments:							
AREA OF COMPETENCY: PERSONAL APPEARANCE							
A. Maintains good physical fitness behavior patterns							
B. Shows good visual poise							
C. Selects and wears proper office attire							
D. Has good personal hygiene habits				HR/PD	AA/CS	67	

MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
	RATING	YR.	INSTR.	RATING	YR.	INSTR.

Comments:

AREA OF COMPETENCY: OFFICE ATTITUDE

A. Relates to male and female co-workers of all ages, skills, backgrounds, and positions

B. Supports company and employer by exhibiting professionalism

C. Shows that he/she is dependable in the office situation

D. Shows initiative in gaining professional advancements

Comments:

AREA OF COMPETENCY: SOCIAL AND BUSINESS ETIQUETTE

A. Displays proper social etiquette

B. Displays proper business etiquette

Comments:

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AREA OF COMPETENCY: JOB SEEKING SKILLS

A. Identifies job opportunities for which he/she is qualified

B. Prepares for job interview

C. Participates in a job interview

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	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
D. Follows up on the job interview							
Comments:							

Statements of competencies can be graded at either the secondary or post-secondary level.

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APPENDIX-A

Administrative Supervisor

A task list has not been prepared for the administrative supervisor. It is essential that a worker have a basic awareness of company organizations, policies, and practices that can be obtained only through actual work experience within the company.

Additional training could be beneficial in the area of administrative techniques to acquaint a person being promoted to a managerial position with some of the responsibilities he/she may assume.

These responsibilities include:

- supervises administrative support staff
- dictates over own signature
- handles complaints and requests
- prioritizes workload and distributes work
- assigns work to proper persons and gives directions
- develops work schedules and assignments
- assumes responsibility for follow-through and meeting deadlines
- handles personnel-related requests and problems of staff
- maintains high level of morale among workers
- motivates people to achieve desired results
- conducts and attends staff meetings
- makes presentations
- updates and maintains organizational charts
- develops training schedules

APPENDIX-A

- maintains confidential personnel records
- correlates and/or consolidates work of other secretaries
- assumes responsibility for accuracy of own work and for accuracy of work prepared by others for principal's signature
- handles budget responsibilities such as reviewing budgets from other departments, evaluating budgets and reporting findings to next level of management
- conducts career in-house training sessions
- performance planning and appraisal duties
- designs and develops more efficient systems when needed (e.g. systems for receiving telephone messages)
- maintains quality control and production
- determines standards of performance for quality and quantity of output
- stays well informed of the latest developments in the organization
- maintains a good self-image and communicates with others
- participates in outside professional organizations to maintain technical proficiency
- prepares manuals for job procedures, work flow and distribution
- makes recommendations for staffing and promotion
- interviews people
- performs varied administrative duties
- THINKS (e.g. new methods, efficiency, speeches)